

# IRA Asset Transfer/ Direct Rollover Request



For assistance call 1.888.335.3417. Sections 1-7 must be completed for all transfers.

Section 8 must be completed by UMB Bank, n.a. Please print clearly or type all items except signature.

Please return this application to: **Mirae Asset Discovery Funds, 4249 Easton Way Suite 400, Columbus, Ohio 43219**

## 1 IRA Registration

Name of IRA Account Holder (First Middle Last)			
Physical Address (May not be a P.O. Box)			
	Street	Apt./Suite/Floor No.	
	City	State	Zip Code
Social Security No.		Daytime Telephone	
Email Address			

## 2 Present Trustee/Custodian

Name of Present Trustee/Custodian or Plan Admin.			
Address			
	Street	Apt./Suite/Floor No.	
	City	State	Zip Code
Fund Name at Present Trustee			
Account Number at Present Trustee		Telephone No. of Present Trustee/Custodian	

## 3 Account Type to be Transferred

<input type="checkbox"/> Traditional IRA	<input type="checkbox"/> Rollover IRA	<input type="checkbox"/> SEP IRA	<input type="checkbox"/> Employee Qualified Plan, 401(k), Profit-Sharing Plan
<input type="checkbox"/> Roth Contributory IRA, original start date of			<input type="checkbox"/> Roth Conversion IRA, original start date of

### GENERAL INFORMATION

Please read the Mirae Asset Discovery Funds' prospectus for important information about the Funds and the IRA Custodial Agreement and Disclosure Statement for important information regarding IRA investments and retain them for your files.

**Please Note:** IRA Direct Rollovers and Transfers are dependent upon the release of your assets by your existing IRA custodian. Transfer of IRA assets may take up to two months to complete and your Transfer may be further delayed due to various processes undertaken by the financial institutions involved. Please complete this form if you are transferring assets from another institution, are initiating a direct rollover from a corporate retirement plan, a transfer from another IRA to a Mirae Asset Discovery Funds IRA or converting a traditional IRA at another institution to a Mirae Asset Discovery Funds Roth Conversion IRA. If this is a new Mirae Asset Discovery Funds IRA account, you must also complete an IRA application.

We will contact your present Trustee/Custodian to arrange the transfer. If you have any questions or need additional forms, please call 1.888.335.3417.

#### 4 Transfer/Direct Rollover Instructions

I have established an Individual Retirement Account (IRA) with Mirae Asset Discovery Funds. Please transfer my assets in accordance with the instructions below and mail the check to: Mirae Asset Discovery Funds, 4249 Easton Way Suite 400, Columbus, Ohio 43219. **Make your check payable to: Mirae Asset Discovery Funds** (please identify name of specific fund, if possible).

- Liquidate all assets in my IRA account number [redacted] and transfer the entire proceeds.
- Liquidate only part of my assets in my IRA account number [redacted] and transfer \$ [redacted]
- Immediately  On the date I select here [redacted]
- Directly roll over my qualified plan distribution (account number [redacted]) to my IRA

#### 5 Investment Instructions (applicable only to clients with existing Mirae Asset Discovery Funds IRA accounts)

Mirae Asset Discovery Funds [redacted]  
 IRA Account Number [redacted]

I hereby instruct UMB Bank, n.a. to allocate the proceeds of my account transfer to purchase shares in the Mirae Asset Discovery Fund(s) listed below:

FUND	CLASS A	CLASS C	CLASS I
Emerging Markets Fund	\$ [redacted]	\$ [redacted]	\$ [redacted]
Asia Fund	\$ [redacted]	\$ [redacted]	\$ [redacted]
Emerging Markets Great Consumer Fund	\$ [redacted]	\$ [redacted]	\$ [redacted]
Asia Great Consumer Fund	\$ [redacted]	\$ [redacted]	\$ [redacted]
Global Dynamic Bond Fund	\$ [redacted]	\$ [redacted]	\$ [redacted]

Investors who have not already established a Mirae Asset Discovery Funds IRA account must complete an IRA Application, which includes instructions for allocation of transferred amounts.

#### 6 Required Distribution Election Information

**This section is to be completed by existing Custodian/Trustee or Plan Administrator if the individual is age 70½ or older this year.**

Life Expectancy  Single life expectancy  Joint life expectancy

The amount withheld to satisfy this year's required distribution \$ [redacted]

If joint life expectancy:

Name of Designated Beneficiary [redacted]  
 Spouse  Non-spouse December 31 Account Valuation \$ [redacted]

Signature of Present Trustee/Custodian or Plan Admin. [redacted]

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## 7 Signature and Authorization

I hereby agree to the terms and conditions set forth in this transfer authorization and acknowledge having established a Mirae Asset Discovery Funds IRA account through execution of a Mirae Asset Discovery Funds IRA application form.

Signature

Date

**Note:** Your present Custodian may require a Medallion Signature Guarantee. Please check with that institution for requirements. If required, please complete the following:

Name of Bank or Firm

Signature of Officer

Title

(Place Stamp Here)

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## 8 Custodian Acceptance

### Acceptance by new custodian (Completed by UMB Bank, n.a.)

UMB Bank, n.a. agrees to accept transfer of the above amount for deposit to the Depositor's UMB Bank, n.a. Individual Retirement Custodial Account, and requests the liquidation and transfer of assets as indicated above.

By

Date

Title

### Delivery Instructions (For the institution where assets are now held.)

Forward checks to: **Mirae Asset Discovery Funds, 4249 Easton Way Suite 400, Columbus, Ohio 43219**

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